Financial Advisor Recommendations:

I got connected initially with Christian A. Templeman through a referral from Westcop https://westcop.org/. During our initial connection which was a brief phone call back in December 2023, based on my goals of finding a charitable gift annuity program he recommended the National Gift Annuity Foundation, https://nationalgiftannuity.org/ because Westcop doesn't have their own gift annuity program. I would list Westcop as the beneficiary on the gift annuity application. I was able to list NGAF as a payable on death beneficiary on my bank account, and establish a donor advised fund with a community foundation, as that was the first suggestion from NGAF.

I got a chance to reconnect with Christian Templeman today for another brief short phone call. I had an advise based strategy regarding which investment strategy I could update my donor advised fund to. He asked me a little bit of questions to get to know my risk tolerance. Based on my responses and me explaining me buying and selling ETFs in such a short time frame. He said sounded very conservative, that he recommends I go with the more conservative strategy. He couldn't really have any more suggestions.

Morgan Stanley does offer a donor advised fund option, but has a minimum of 25,000, which is more than my current fund balance of $4,900. The minimum grant amount is the same as the community foundation at $250.